

Buyer




1) How do I post a Solicitation/Bid in COMMBUYS?

A: Please reference the following online resources located in the resource COMMBUYS Resource Center on the OSD Website: [Resource Center](#)

ePostcards

- [ePostcard #3: How to Post a Bid in COMMBUYS](#)
- [ePostcard #4 Awarding Contracts in COMMBUYS](#)

Job Aids

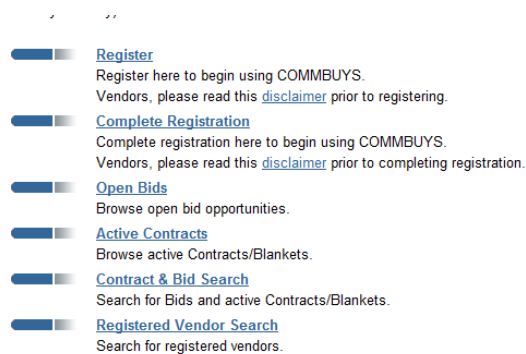
- [How to Score and Award a Solicitation](#)  5/2/2014
- [How to Create and Post a Solicitation from a Requisition](#)  5/2/2014
- [How to Create and Post a Solicitation from Scratch](#)  5/2/2014

2) How do I find the names of the vendors that have awarded on a specific contract?

A: Check to ensure the vendor is registered in Commbuys. If they are not, please direct them to register in COMMBUYS; please see the following job aid: [Vendor Registration](#)  3/19/2014

You can find the name of vendor awarded a contract by the Public Search or Logging in.

Public Search



- Select Contract/Bid hyperlink [Contract & Bid Search](#)
- Select Radio button for Contracts/Blankets**
The Advanced search screen opens. Enter desired search criteria to narrow your search
KEEP IN MIND: You must narrow your search criteria. If you select the FIND IT button without entering search criteria COMMBUYS performs a global search and returns all data entered in COMMBUYS.
- Enter search criteria such as the COMMBUYS Contract Number (or enter the CommPASS contract number in the Contract/Blanket # field), Vendor name and Purchase Method.** COMMBUYS allows multiple options to sort data to narrow your search. Keep in mind the

Advanced Search function looks similar throughout COMMBUYs BUT how you access the Advanced Search Function changes the fields



d. Search results will display

3) How do I set-up /configure an approval paths?

COMMBUYs enables automated workflow of documents, such as Requisitions and Purchase Orders, so that these documents can be reviewed and approved prior to a purchase being made. These workflows are preset paths for documents and are set up to support agency policy and procedures. Approval paths automatically attach to documents and route them to the appropriate approvers. In most organizations, approval paths will be based on one or several of the following criteria:

- The business unit originating the purchasing request;
- The dollar amounts (or estimated dollar amounts) of the items being purchased or procured;
- The commodities being purchased or procured; and
- The type of document in the purchasing/procurement process.

OSD Website- Job Aids for Purchaser-OA Administer section:

- [How to Create and Maintain Approval Paths](#)  file size 1MB 5/2/2014
- [How to Approve Documents](#)  5/2/2014

Webinar

- [COMMBUY Buyers webinar: Approving Documents in COMMBUYs 10Apr14 UPDATE, Approving Documents in COMMBUYs](#)

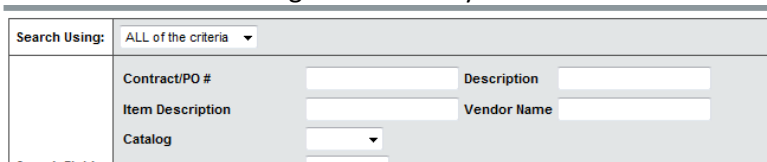
4) How does the Organizational Administer (OA) create, manage departments and locations for their agency in Commbuys?

A: Job Aid

[How to Create and Maintain Departments/Locations](#)  file size 1MB 5/2/2014

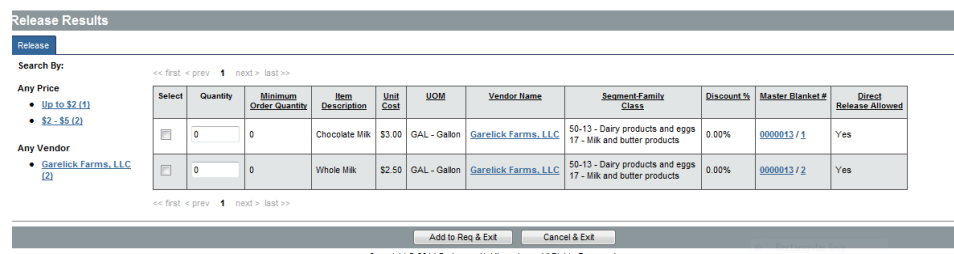
5) How do I search for an item to purchase from a state-wide (SWC) Contract? There are several ways by which you can search for item to purchase from a SWC. One way is to search within a new requisition; however you can also search without creating a document.

- Create your Release requisition
- Complete the required fields within the General tab
- Open the Items Tab and Click Search Items
- The Item Search opens and you can search by the following methods until your item is located
 - Enter COMMBUYS (MBPO) number enter
 - Enter Compass contract number in Description filed. For example:GRO32
 - *Enter Item Description** (this would be most commonly used search option)
 - Enter Vendor Name
 - Enter UNSPSC Code (segment family) Use advanced function if you only know the item and not UNSPSC segment of family



The screenshot shows a search form with a dropdown menu set to 'ALL of the criteria'. Below this are four input fields: 'Contract/PO #' with a text box, 'Description' with a text box, 'Item Description' with a text box, and 'Vendor Name' with a text box. There is also a 'Catalog' dropdown menu.

Search Result display



The screenshot shows a table titled 'Release Results' with a 'Release' button. Below the button is a 'Search By:' section with filters for 'Any Price' (Up to \$2 (1), \$2 - \$5 (2)) and 'Any Vendor' (Garelick Farms, LLC (2)). The table has columns: Select, Quantity, Minimum Order Quantity, Item Description, Unit Cost, UOM, Vendor Name, Segment Family Class, Discount %, Master Blanket #, and Direct Release Allowed. The table contains two rows of data for chocolate and whole milk from Garelick Farms, LLC.

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name	Segment Family Class	Discount %	Master Blanket #	Direct Release Allowed
<input type="checkbox"/>	0	0	Chocolate Milk	\$3.00	GAL - Gallon	Garelick Farms, LLC	50-13 - Dairy products and eggs 17 - Milk and butter products	0.00%	0000013 / 1	Yes
<input type="checkbox"/>	0	0	Whole Milk	\$2.50	GAL - Gallon	Garelick Farms, LLC	50-13 - Dairy products and eggs 17 - Milk and butter products	0.00%	0000013 / 2	Yes

Outside the Document

- Use the Advanced Search Icon
- Select Items from document dropdown
- Search using the Items Advanced Search (which will appear very similar to the Items Search on a Requisition)

Searching for UNSPSC Code by using an item

- Use the Advanced Search Icon
- Select Commodity codes from Document dropdown
- Enter item in the description field
- Click find it

Screen shot show searching UNSPSC segment and family by item. The example is Milk

Advanced Search

Search for: Module: **Purchasing Module** Document Type: **Commodity Codes**

Search Using: **ALL of the criteria**

Find It **Clear**

Search Fields:

UNSPSC Segment-Family **UNSPSC Class** **UNSPSC Group** **Description** **milk**

Find It **Clear**

Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved


- Screen shot shows UNSPSC search results
- Select the desired UNSPSC segment/family
- Enter into document items search field

Advanced Search **Results**

1-25 of 30
1 2

Commodity-EPP	Description	Group	Segment-Family	Class
10-12-18-03	Milk for dogs or cats	Yes	10-12 - Animal feed	18 - Dog and cat food
10-12-18-03-0000	Milk for dogs or cats	No	10-12 - Animal feed	18 - Dog and cat food
10-50-15-02	Fresh cut milky way aspidistra	Yes	10-50 - Fresh cut greenery	15 - Fresh cut aspidistras
10-50-15-02-0000	Fresh cut milky way aspidistra	No	10-50 - Fresh cut greenery	15 - Fresh cut aspidistras
21-10-19-01	Milking machines	Yes	21-10 - Agricultural and forestry and landscape machinery and equipm	19 - Poultry and livestock equipment
21-10-19-01-0000	Milking machines	No	21-10 - Agricultural and forestry and landscape machinery and equipm	19 - Poultry and livestock equipment
21-10-19-08	Milk cooling tanks	Yes	21-10 - Agricultural and forestry and landscape machinery and equipm	19 - Poultry and livestock equipment
21-10-19-08-0000	Milk cooling tanks	No	21-10 - Agricultural and forestry and landscape machinery and equipm	19 - Poultry and livestock equipment
41-11-30-42	Milk analyzer	Yes	41-11 - Measuring and observing and testing instruments	30 - Chemical evaluation instruments and supplies
41-11-30-42-0000	Milk analyzer	No	41-11 - Measuring and observing and testing instruments	30 - Chemical evaluation instruments and supplies

6) & 7) Bid Questions

How do I amend a Bid? How do I extend the bid opening date? The job aid ([How to Amend a Solicitation](#)  5/2/2014) include all steps required to amend a bid except for extending the bid opening date. Keep in mind if the bid is still in progress (has not been posted) you don't need to create a bid amendment.

Locate the BID to amend

Bids - Sent

Bid(5)

Bid #	Organization	Buyer	Description
00000132	Operational Services Division	Buyer Buyer	do an bid amendment
00000131	Operational Services Division	Buyer Buyer	blanket
00000067	Operational Services Division	Buyer Buyer	releasat req
00000066	Operational Services Division	Buyer Buyer	Shelter Supplies
00000056	Operational Services Division	Buyer Buyer	Quick Buy Requisition

The bid opens to the **Summary** tab and click on the **Amendments** tab.

Open Market Bid 00000132			
General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary			
Header Information			
Bid Number:	00000132	Description:	do an bid amendment
Purchaser:	Buyer Buyer	Minor Status:	
Organization:	Operational Services Division		
Fiscal Year:	14	Department:	00100 - PETS PLUS
Show On Web:	Yes	Allow Electronic Quote:	Yes
Bid Opening Date:	01/09/2014 06:00:00 PM	Available Date:	01/09/2014 04:37:00 PM
Purge Date:			
Bid Type:	Open Bid	Informal Bid:	No
Control Code:		Estimated Cost:	\$1,050.00
Alternate ID:		Purchase Method:	Open Market

The Amendments tab displays. Click the **Create Bid Amendment** button.

Open Market Bid 00000132

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders

There are no bid amendment for this document

Create Bid Amendment

The Bid Amendment General tab opens. There are four available tabs on the bid amendment.

- General – permits changes to dates, purchaser, contact
 - Available Date and Bid Opening Date: Use calendar icon to select date
- Items – changes such as add or delete items, change amounts or prices
- Attachments – add or remove files
- Summary – review and resubmit amendment for approval

Bid Amendment - Open Market Bid 00000132

General Items Attachments Summary Back to Bid

Bid Number: 00000132 Description: do an bid amendment

Status: 2BS - Sent Purchaser: Buyer, Buyer

How Solicited: Email Type Code:

Department: 00100 - PETS PLUS Fiscal Year: 2014

Location: 100 - BOS-PP Organization: Operational Services Division

Show on Web: ☒ Allow Electronic Response: ☒

Required Date: Bid Opening Date: 01/09/2014 06:00:00 PM

Available Date: 01/09/2014 04:37:00 PM

Bid Type: Open Bid Purge Date:

Control Code: Informal Bid

Print Desc Detail: Estimated Cost: \$1,050.00

Purchase Method: Open Market Alternate ID:

Tax Rate: Solicitation Enabled: No

Item Single Award Only: ☐

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc:

Quote Notification: ☒

Date Last Updated: 01/09/2014 04:54:00 PM User last Updated: Buyer Buyer

Save & Continue

For this amendment, update the Bid Opening Date to a future date. Click **Save & Continue**. Click the Summary tab to review any bid changes before submitting for approval

8) How do I find a bid that I posted on COMMBUYS? You can locate a posted Bid from the public search and by Logging in to COMMBUYS. From the Public view, click blue hyperlink Contract & Bid Search.

You can search using a combination of fields and information:

Select Search BIDs

A diagram of a search box. It consists of a rectangular box divided into two main sections. The top section contains a magnifying glass icon and the text "a. -> Search for Bids". The bottom section is empty.

- Enter the COMMBUYS Bid #
- Enter the CommPASS (or agency) Bid number in the Bid description field
- Enter a name for the Purchaser dropdown
- Enter your Organization from the Organization Dropdown
- Enter your department from the department Dropdown list

A screenshot of the "Advanced Search" form. The form has a header bar with the title "Advanced Search". Below the header, there are two tabs: "Bids" (selected) and "Contracts/Blankets". The "Search Using:" dropdown is set to "ALL of the criteria". There are "Find it" and "Clear" buttons. The search fields are organized into two columns. The left column includes: Bid #, Bid Description, Organization, Department, Location, Type Code, Catalog, Purchase Method, U N S P S C Segment-Family, U N S P S C Class, and Commodity-EPP. The right column includes: Bid Opening Date(MM/DD/YYYY), Purchaser, Entered Date(MM/DD/YYYY), and Stock Item Number. There are "Find it" and "Clear" buttons at the bottom.

Sign in and use the Advanced Search functionality.

- Click the down arrow next to the module name to display the module drop-down menu.
- Select Purchasing Module – the only option we will use in COMMBUYS
- Clicking the down arrow next to the Document Type field displays the Document Type drop-down menu.
- Select Bid Document Type
- Bid Advanced Search Functionality opens
- Enter any known information you have available in the search fields

A screenshot of the "Advanced Search" form. The "Search for:" section shows "Module: Purchasing Module" and "Document Type: Bids". The "Search Using:" dropdown is set to "ALL of the criteria". There are "Find it" and "Clear" buttons. The search fields are organized into two columns. The left column includes: Bid #, Bid Description (with the value "545"), Current Major Status, Current Minor Status, Organization, Department, Location, Type Code, Catalog, Purchase Method, Required Date(MM/DD/YYYY), U N S P S C Segment-Family, U N S P S C Class, and Commodity-EPP. The right column includes: Bid Opening Date(MM/DD/YYYY), Purchaser, Alternate Id, Entered Date(MM/DD/YYYY), Update Date(MM/DD/YYYY), and Stock Item Number. There are "Find it" and "Clear" buttons at the bottom.

UNSPSC Code Browse | My Account | Customer Service | About

Current Organization: Operational Services Division

June 4, 2014 11:56:29 AM EDT

Home

Documents

Kim McPhail

Advanced Search


Results

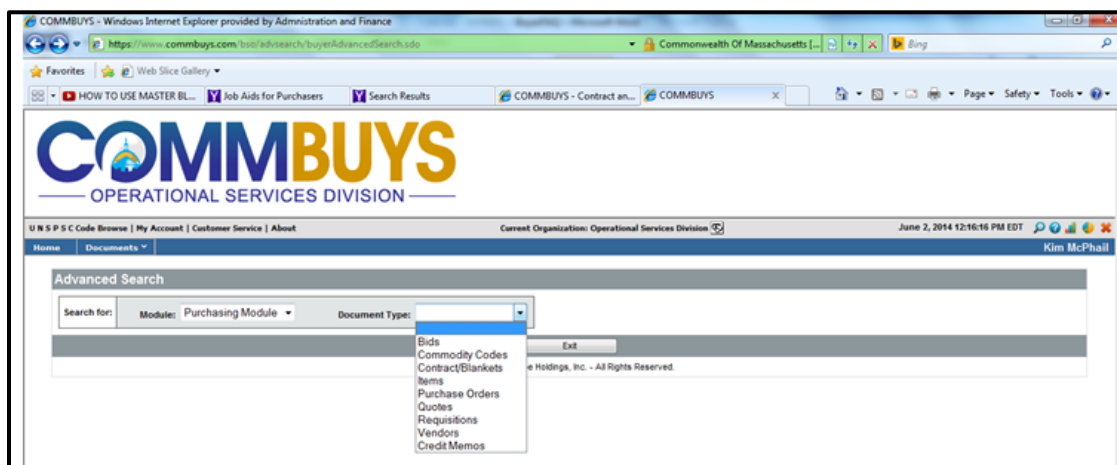
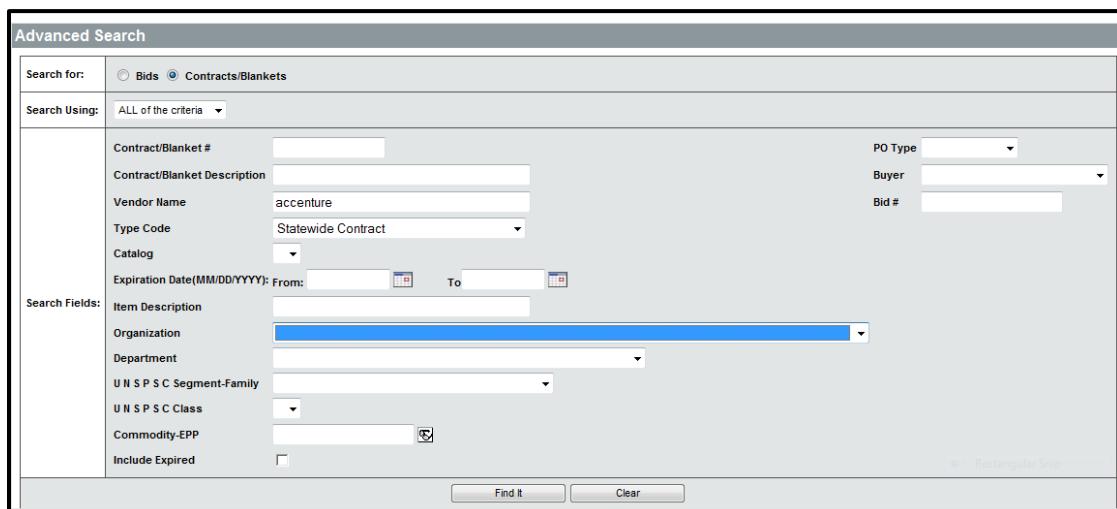
Bid #	Description	Purchase Order #	Purchase Method	Bid Opening Date	Organization	Dept/Loc	Purchaser	Total	Status	Alternate Id
5161486-vCurrent	PLYMOUTH - FA# STP-0025(545)(X) Roadway Reconstruction and Related Work (Including Traffic Signals)		Blanket	10/22/2013 02:00:00 PM	Department of Transportation	1030CONVD / 1030L	eProcurement Solicitation	\$3,723,000.00	Bid to PO	600426

Exit

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

9) How do I find vendors on Blanket /MBPO?

- Login to COMMBUYS
-  Use the advanced search on Homepage
- The Advanced Search screen opens
- The Purchasing Module : This is where the module to search is selected always to Purchasing
- The Document Type: This is the type of document listed by module is selected.
- Enter Vendor Name
- Select Find it Button
- Search Results Display

Search results show Vendors on SWC

Results						
Contract/Blankets #	Bid #	Description	Vendor Name	Type Code	Begin Date	End Date
PO-14-1089-OSD01-OSD10-00000000315		PRF46	Accenture	SW	12/29/2010	12/31/2014

Exit

From the Public Search, known as COMMBUYS Landing Page

- Select Contract & Bid Search hyperlink



Search for: ☐ Bids ☒ Contracts/Blankets

- Select the Contracts radio button
- The Advanced Search Opens
- Enter Vendor Name and/or Type Code

Advanced Search screen shows the Vendor Name and Type Code

Advanced Search

Search for: ☐ Bids ☒ Contracts/Blankets

Search Using:

Contract/Blanket #

Contract/Blanket Description

Vendor Name

Type Code

Catalog

Expiration Date(MM/DD/YYYY): From: To:

PO Type

Buyer

Bid #

Search Fields:

Item Description

Organization

Department

U N S P S C Segment-Family

U N S P S C Class

Commodity-EPP

Include Expired ☐

Find It Clear

Result search displays search results for Vendors on SWC

Results						
Contract/Blankets #	Bid #	Description	Vendor Name	Type Code	Begin Date	End Date
PO-14-1089-OSD01-OSD10-00000000315		PRF46	Accenture	SW	12/29/2010	12/31/2014

Exit

10) Commodity codes: We require more to provide a complete answer. In the interim we have a helpful webinar to be posted

Webinar

- COMMBUYS UNSPSC Overview [COMMBUYS UNSPSC Overview webcast](#)

11) How to create a WTO Notice? Please refer to the COMMBUYS Use Policy for Purchasing Organizations issued on March 12, 2014.

World Trade Organization (WTO) Intent to Post

In compliance with the World Trade Organization (WTO)'s [Agreement on Government Procurement \(AGP\)](#), Departments seeking goods and services including human and social services valued at more than \$558,000 or construction valued at more than \$7,864,000 must post either (a) a COMMBUYS announcement of their intention to issue a bid and their actual Bid documents for a combined time period of at least 40 days prior to the Bid Opening Date or (b) the actual Bid documents for the entire 40 days prior to the Bid Opening Date. The Intent to Post template language is provided in Appendix 1 of this document. (Please Note: These WTO threshold levels change every 2 years and will be updated again in January 2016).

Appendix 1. World Trade Organization (WTO) Intent to Post Notice

Instructions: To create a WTO posting, Departments must create a Bid record including the words "Announcement Only" followed by the bid title in the Description field. An attachment with the file name "IntentToPost" and the following content (with appropriate customization) must be attached to the Bid.

This is an announcement only. [Department Name] of the Commonwealth of Massachusetts intends to post a solicitation for [scope description] and to require online bid submission via COMMBUYS. Please do not contact the Purchaser with questions about the anticipated solicitation. Bidders are solely responsible to monitor this site for amendments to this announcement, if any, and for the complete Bid posting, if any. Bidders may monitor the site through publicly accessible search and browse tools, or through COMMBUYS email notification and record tracking tools by ensuring the commodity codes associated with this record are included in the commodity codes section of their COMMBUYS profile. Bidders may elect to subscribe to COMMBUYS immediately or wait until they have reviewed the complete Bid posting including the RFR and its amendments, if any. Bidders who elect to establish a COMMBUYS account must select the Register link on [Link to commbuys.com](#) and complete the online subscription process.

Screenshot below highlights the correct WTO notice in COMMBUYS.

Input Description

Input Bulletin Description

Bid Solicitation: BD-14-1019-DCP03-OFA02-0000000503			
Header Information			
Bid Number:	BD-14-1019-DCP03-OFA02-0000000503	Description:	WTO/GPA Notice of Planned Procurement
Purchaser:	Mei Klayman	Organization:	Division of Capital Asset Management and Maintenance
Department:	DCP03 - Office of Finance	Location:	OFA02 - Office of Finance
Fiscal Year:	14	Type Code:	
Alternate Id:		Required Date:	
Info Contact:		Bid Type:	OPEN
Purchase Method:	Open Market	Allow Electronic Quote:	Yes
		Available Date :	05/20/2014 04:15:00 PM
		Informal Bid Flag:	No
Pre Bid Conference:			
Bulletin Desc:	In accordance with the Commonwealth's requirement for notification of planned large procurements under the WTO/GPA, DCAMM is announcing the planned procurement of Integrated Facilities Management Janitorial Maintenance Services. DCAMM has established this multi-award solicitation offering janitorial maintenance companies of all sizes from all areas of the state an opportunity to respond.		
Ship-to Address:	1 Ashburton Place 15th Floor Boston, MA 02108 US Email: tbd@state.ma.us Phone: (617)727-4006	Bill-to Address:	1 Ashburton Place 15th Floor Boston, MA 02108 US Email: tbd@state.ma.us Phone: (617)727-4006
File Attachments:	Notice of Planned Procurement		
Form Attachments:			
Item Information			
Item # 1: (76-11 - 00)	NOTICE OF PLANNED PROCUREMENT: In accordance with the Commonwealth's requirement for notification of planned large procurements under the WTO/GPA, DCAMM is announcing the planned procurement of Integrated Facilities Management Janitorial Maintenance Services. DCAMM has established this multi-award solicitation offering janitorial maintenance companies of all sizes from all areas of the state an opportunity to respond to its need for janitorial maintenance services at state buildings managed by DCAMM under the statewide Integrated Facilities Management initiative		
UNSPSC Code: 76-11-00			

12) How do I purchase through G2B catalogs (punch out). The G2B Punch-out allows user to go directly to a seller's catalog, select the items required, place them into a virtual shopping cart and check out, which then populates a Release Requisition with all item detail in COMMBUYS.

To Begin **Click** the shopping cart icon in the upper right corner of the Home Page. User will be redirected to the eCatalog for the selected seller.

- **Select** Vendor from drop down
- **Select** Department and Location if no default
- Modify Ship To address if needed
- Modify Bill To address if needed

G2B Punchout Shopping

Department: DEPT: Dept 132

Location: LOC: Location 132

Ship-to Address: DEPT: Department 1

Bill-to Address: DEPT: Dept 132

Buttons: Purchase, Cancel, Cancel & Exit

Click "Punchout" at the bottom of the screen.



Search and select the items and quantities needed and proceed to checkout as directed by Company's online catalog. Once the Release Requisition has been generated in COMMBUYS, the document will travel through the appropriate approval paths.

14) How can I find out more about my approver and approval paths for my documents?

- First Speak to your Organizational Administer
 - In COMMBUYS, there are a couple of different ways to view approvals and approval paths
 - In each document you can see the approver and assigned approval path in the routing tab.
 - Approval information will also display on bottom of the Summary tab.

15) I can't find my bid /contract I created in COMPASS in COMMBUYS? See new Job Aid (which has not been approved yet)

Figure 1- Screen shot of link to job aid below



COMMBUYS Find
Departmental Contra

Keep in Mind: A COMMBUYS user ID is not required nor does a user have to log into COMMBUYS to view departmental contracts or Master Blanket Purchase Orders. Users with a Login ID are able to see the same information; however the tabs of Master Blanket will appear, in addition to invoice and approval path detail (if applicable). When searching for converted departmental contracts, choose the file name which includes vCurrent; this implies it is the most current Comm-PASS record; all other contract records which will appears with a V and then a number as the previous Comm-PASS versions of that departmental contract.

From the Public Search

- Select BID/Contract Search Blue Hyperlink
- Search for either document in COMMBUYS using any of the available search criteria
 - Use the Description field to search for the CommPASS number/name in COMMBUYS

From a Login View

Go to Advanced Search

- Select Bid or Contract in the document drop down
- Search for either document in COMMBUYS using any of the available search criteria
 - Use the Description field to search for the CommPASS number/name in COMMBUYS